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The Effect of Avian Influenza on Poultry Exports: Thailand and Brazil

Thailand's poultry industry is recovering from an outbreak of highly pathogenic avian influenza (HPAI) which resulted in the slaughter of at least 36 million birds. In early January, 2004 Thailand was suspected of having Highly Pathogenic Avian Influenza (HPAI). On January 22, 2004 Japan banned all poultry imports from Thailand. The next day Thailand confirmed the presence of HPAI and the European Union immediately suspended imports of fresh poultry meat. Imports of poultry meat treated to a temperature of 70 degrees Celsius (158 degrees Fahrenheit) were not affected by the ban.

Thailand began a testing and stamping out program and by mid-February, over 27 million birds had died or been destroyed. Since then, Thailand has been close to declaring the country free of avian influenza only to have the disease surface again sporadically.

In late February, after the Thai government took steps to contain the disease, Japan lifted the ban on cooked poultry imports. Japan and the EU are Thailand's main poultry export markets.

Source: OIE (World Organization for Animal Health), Thai Customs, Brazil Ministry of Agriculture, USDA/FAS, various news wires

The export value of poultry and poultry products and eggs and egg products plummeted almost 96 percent for the first three months of 2004 compared to the same period in 2003. Exports of frozen chicken meat and offal fell almost 73 percent in quantity and 68 percent in value during that time. Prepared fowl increased 230 percent in value as some countries continued to import cooked poultry from Thailand.

Brazil's chicken meat exports increased 9.3 percent in volume to 537,335 metric tons during the first quarter of 2004. The value of those exports increased 46 percent. Processed broiler exports showed the strongest growth, reaching 11,239 MT, up 44.1 percent from the same period in 2003. The Brazilian Broiler Processing Exporters Association (ABEF) said Brazil could have exported an additional 20,000 MT during the first quarter, however a strike by Brazilian government inspectors temporarily hit all agricultural and food exports earlier this year.

Exports of broiler parts to Japan rose 88 percent and the average price of chicken meat exports grew from US\$989 to US\$1,548 per MT FOB.

Thailand Exports: Frozen Chicken Meat and Edible Offal KG

| | March | | January-March | |
|-----------------|-----------|------------|---------------|------------|
| | 2004 | 2003 | 2004 | 2003 |
| UAE | - | 46,932 | 71,940 | 252,081 |
| Belgium | 19,431 | 48,000 | 135,487 | 96,000 |
| Switzerland | - | 16,650 | 72,060 | 33,148 |
| China | - | 1,030,212 | 696,746 | 4,656,830 |
| Czech Republic | - | - | 24,000 | - |
| Germany | 941,568 | 6,605,611 | 5,487,380 | 19,731,627 |
| Denmark | - | 24,000 | 12,000 | 48,000 |
| UK | 152,484 | 538,423 | 1,125,228 | 2,841,888 |
| Hong Kong | - | 673,736 | 242,728 | 3,004,679 |
| Ireland | - | 22,680 | 22,704 | 69,300 |
| Japan | 3,084 | 13,660,827 | 9,990,538 | 40,980,397 |
| Korea | - | 413,952 | 173,976 | 808,892 |
| Korea, Republic | - | 4,115,436 | 2,824,828 | 10,077,428 |
| Kuwait | - | - | 119,486 | 23,160 |
| Sri Lanka | - | - | 10,008 | - |
| Malaysia | - | 770,136 | 504,504 | 2,392,885 |
| Netherlands | 114,012 | 1,668,057 | 2,646,803 | 3,970,726 |
| Romania | - | 20,004 | 75,148 | 60,012 |
| Singapore | - | 705,521 | 709,300 | 2,558,135 |
| Slovakia | - | - | 67,600 | 21,600 |
| South Africa | - | - | 49,992 | - |
| Liberia | - | 22,992 | 0 | 22,992 |
| Viet Nam | - | - | 0 | 24,000 |
| Total | 1,230,579 | 30,383,169 | 25,062,456 | 91,673,780 |

Source: Thailand Customs

Corrected Table

Brazil Exports: Chicken Cuts in metric tons

| | March | | January-March | |
|----------------|---------|--------|---------------|---------|
| | 2004 | 2003 | 2004 | 2003 |
| Japan | 26,603 | 6,595 | 67,308 | 35,765 |
| Hong Kong | 11,247 | 14,898 | 42,911 | 45,605 |
| Netherlands | 6,807 | 7,498 | 21,208 | 16,305 |
| Germany | 3,421 | 10,034 | 12,565 | 30,411 |
| Russia | 6,818 | 33,318 | 6,818 | 33,318 |
| Ukraine | 3,173 | 472 | 16,308 | 3,499 |
| Canada | 1,655 | 100 | 1,655 | 100 |
| South Africa | 7,255 | 3,146 | 20,027 | 12,128 |
| UK | 1,629 | 2,876 | 4,119 | 6,115 |
| Spain | 2,381 | 1,692 | 2,381 | 1,692 |
| Singapore | 3,470 | 2,959 | 8,635 | 12,898 |
| Czech Republic | 0 | 0 | 4,548 | 960 |
| Poland | 2,406 | 0 | 7,113 | 0 |
| China | 3,044 | 130 | 9,694 | 417 |
| Romania | 0 | 0 | 4,508 | 1,779 |
| UAE | 2,074 | 901 | 5,908 | 3,500 |
| Saudi Arabia | 2,821 | 1,242 | 4,429 | 2,381 |
| Kuwait | 0 | 0 | 1,535 | 901 |
| Cayman Islands | 0 | 0 | 769 | 550 |
| Ghana | 0 | 0 | 912 | 294 |
| Sub-total | 84,804 | 85,861 | 243,351 | 208,618 |
| Others | 19,600 | 9,174 | 57,383 | 62,063 |
| TOTAL | 104,404 | 95,035 | 300,734 | 270,681 |

Source: Brazil Ministry of Agriculture